

Customer Service Operations

I. Customer Service Vision

The OCME will consistently deliver world-class customer service in all aspects of its work. Agency employees will readily supply information to meet the diverse needs of all constituents and educate them as to the processes involved in all deliverables. The agency will focus on efficient, timely and professional delivery of services.

In our effort to identify ways to continuously improve our processes, systems, and policies, the agency encourages and acts upon feedback and suggestions from both internal and external customers.

II. Customer Service Guidelines

The objective is to provide high quality customer service in the following ways:

- Treat customers with enthusiasm, courtesy and respect
- Promptly answer customer questions with accurate, objective information
- Resolve customer needs with the fewest number of calls possible
- Provide educational information to customers about the resources the agency manages and customers use, as well as the laws and regulations governing their use
- Use language that customers can easily understand
- Ask for and consider customer ideas about agency plans, programs, and services
- Promptly respond to customer suggestions, concerns, and complaints

All employees are directly responsible for delivering customer service commitments. To support employees, the agency:

- Gives workers the decision-making parameters enabling them to go "the extra mile" to satisfy customers
- Involves employees in customer service improvement initiatives
- Establishes a customer-focused culture and infrastructure at all levels of management and internal support

III. Customer Service Standards for Telephone

In order to ensure that the District government is providing the highest level of customer service to each caller, District agencies and offices shall implement the following minimum standards for telephone-based customer service. The overall mandate is to staff the agency's main service number on a 24 hour basis, 7 days a week. Generally, individual employees are to answer phones, comply with voicemail standards and return calls within 24 hours.

General definitions and guidelines for telephone customer service standards are outlined herein.

A. Main vs. Individual Desk Numbers

From a customer service perspective, telephone services are operationally defined in four categories: Main numbers, large service numbers, small service numbers and desk numbers.

- **Main Numbers** – are entry points into the agency/department. Main numbers route calls throughout the organization. (i.e., Department of Health's main number is (202) 442–5999. This number should be staffed at all times during business hours.

The OCME's main number is 202-698-9000 and it is staffed on a 24 hour basis, 7 days a week. An alternative cell-phone number (202-329-9000) is to be utilized in the event of emergencies to ensure that the main number is answered even when the main number is not available for use. When the alternative number must be utilized, a voicemail message must be generated on the main number to alert constituents to call the alternative number.

- **Desk Numbers** – are telephone numbers for agency/division employees. All employees should answer calls professionally and courteously. Desk voicemail should also reflect the same professionalism that would be provided during a direct conversation with a constituent.

B. Receiving and Returning Telephone Calls

- **Returning Telephone Calls** – Calls made to all numbers at every level of government should be returned within 24 hours of receipt or within the next business day.
- **Salutation** – State name and agency, and solicit information (i.e., "Thank you for calling agency X this is John Doe. Can I help you?"). At the end of the conversation, thank the person for calling.
- **Receiving a Transferred Call**
 - All DC employees are expected to take transferred calls from telephone call distribution points (i.e., Mayor's Call Center or other employees within the agency or division).
 - The employee should minimize the number of times a caller is transferred to resolve an issue by taking the message and distributing it to the appropriate staff person for resolution. The goal is one transfer per constituent and the transfer should be to another person, not voicemail. If the call is inappropriately transferred to you, take down the caller's information and have the appropriate individual return the telephone call.
- **Basic Knowledge**
 - All DC employees are expected to have a basic understanding of the primary functions of their agency.
 - The employee should have a basic knowledge of District services (i.e. 311, 911, Answers Please, website address, and main agency numbers).

C. Telephone Etiquette

In addition to the requirements for salutation, call transfer and basic knowledge (as listed in Section III), each telephone call should be handled with the highest level of customer service by all District employees:

- Answer calls within 3 rings
- Give customers options (i.e., hold, call back, leave a message, try another number)
- Ask to put the caller on hold and wait for the response
- Check back with customer frequently when placed on hold
- Use judgment by handling callers as you would want your call to be handled
- Provide options for resolution
- Facilitate
- Speak as you would like to be spoken to

D. Courtesy

Each caller to a District agency should be treated with the highest level of customer service by all District employees:

- No speakerphones
- No food or gum while talking with constituent
- No secondary conversations with individuals other than caller while caller is on the phone
- Convey sympathy, professional courtesy and a pleasant attitude
- Provide reference information when transferring calls
- Treat callers as you would want to be treated
- No rudeness
- Do not become confrontational

IV. Customer Service Standards for Voicemail

A. Main Agency Greeting – Based upon the requirement that all main numbers are staffed during business hours, the voicemail greeting for all main numbers should be an "after hours" greeting. This greeting should convey the following information:

- Agency/Department unit Hours of operation Options for caller (e.g., leave a message, web site address, fax number, information about critical services available after normal business hours)
- Statement on when calls will be returned (i.e. the standard is 24 hours or the next business day)

B. Desk Telephone Standard Greetings – Every telephone equipped with voicemail should have a standard outgoing greeting that is professional, concise, and conveys relevant and useful information to the caller. Each desk phone greeting should include the following information:

- Name of employee Title of employee Organizational unit of employee Number to dial for immediate assistance, or "0" for operator assistance
- Statement on when calls will be returned (i.e. the standard is 24 hours or within the next business day)

Note: The automated greeting option available through the District's voice messaging system does not comply with the standard.

- C. **Extended Absence Greeting** – Every employee who will be out of the office for more than two business days (annual/sick leave, training, jury duty) should record an extended absence greeting. In addition to the standards in section B, this greeting should outline the expected date of return or forward all calls to an employee in the office.
- D. **Returning Phone Calls** – Calls made to all numbers at every level of government should be returned within 24 hours or the next business day.
- E. **Voicemail Boxes** – All employee voice mailboxes should be set-up and ready to accept voice messages. Each voice mailbox should never be full and unable to accept new messages

V. Customer Service Standards for Correspondence

The following policy outlines correspondence standards and formats to be implemented that shall set precise methods for the handling of correspondence for the OCME. Generally, written correspondence, as defined in the standard, is to be responded to, tracked, and effectively managed in a timely fashion.

Definition: Correspondence is to be defined as any written material transmitted to or from the agency, division or unit of the agency or an employee for the transaction of agency related business. This includes letters, memoranda, emails and faxes submitted for action or information.

Purpose: In order to ensure that the OCME is providing the highest level of customer service to each constituent or entity that contacts the government in writing, the agency will implement the following minimum standards for handling correspondence. *These standards have been developed to ensure that the agency is consistently **responsive** and accountable when contacted in writing.* All guidelines below have been written with that purpose in mind.

PART I

Acknowledgement: Correspondence that requires action by or requests information from the agency, except when written directly to the Mayor, should be acknowledged or responded to within 2 business days. This acknowledgement is necessary to manage requestors' expectations and to make them aware that the agency has received the request and is working to resolve it. The correspondence should be forwarded to the employee who has direct knowledge involvement or expertise in the matter.

The acknowledgement should contain the following:

- Thank you for writing
- Realistic timeframe for issue–resolution
- Contact person's name, telephone number, and email address
- Tracking/identification number for requestor to follow up

This acknowledgement can be in the form of a letter, email, fax or, phone call but should be documented within the agency tracking system (Please see the next topic, *Technology/Tracking*, for minimum documentation standards).

Technology/Tracking: Tracking requirements are to ensure that agencies appropriately monitor the status of correspondence received and can retrieve documents when necessary. All correspondence must be tracked in an electronic log. This system should be shared throughout the agency. The tracking requirements are as follows:

- An assigned tracking number for individual correspondence and requestor's identity
- Tracking information on employee to whom correspondence was forwarded for response
- Retrieval capability—keeping a record of original correspondence on file for document recall (i.e. scanned image, file copy)
- Reporting capability (i.e. volume, open/closed, status, categorize, and summarize)
- Recording specific action taken on correspondence in system
- Specific status capability (i.e. indicate agency personnel responsible for responding where the correspondence is in the process of resolution)

Provide Resolution/Fulfill Request: All correspondence should be appropriately resolved by the agency within the articulated timeframe. Responses should *address all issues* raised within the initial correspondence and be free from grammatical and spelling errors. When responding in writing, please follow guidelines in the *Formatting Letters and Memoranda* section of this document.

Email Reply: Unless otherwise indicated by the originator, it is suitable to respond to constituent requests via email. Should an employee choose this vehicle, the email at a minimum must:

- thank the constituent for writing;
- be edited to ensure that the message conveys appropriate information and it is free from grammatical and spelling errors;
- provide appropriate signature line (e.g. name, title, agency/department, email address, phone, and fax); and
- be professional. Email may be used as official correspondence and is a reflection of the agency and government. Email should not contain personal logos, wallpaper, or phrases that are different from the mission or goals of the agency or government.

If resolution cannot be provided within the articulated timeframe, the employee is expected to initiate follow-up contact with the constituent, provide a new resolution date, and fulfill the request within this new timeframe.

Individual Employee Responsibility: If correspondence is addressed directly to an individual employee, it is the responsibility of that employee to:

- assume personal responsibility to respond to and resolve any correspondence addressed to the employee and, if necessary, direct correspondence throughout the agency or to another agency for resolution;
- follow the *acknowledgement standards* outlined above;
- keep a record of the individual correspondence when the correspondence requests agency services or information; OR
- utilize (where appropriate) the main agency/sub-unit/department's tracking system.

Message-sensitive or policy-sensitive requests should be coordinated through the agency's public information officer, legal counsel, and/or senior advisor.

Out-of-the-Office Auto-response: If an employee will be out of the office for more than one full business day (eight hours), it is the employee's responsibility to have an out-of-the-office, auto-response email describing:

- the employee's absence from the office;
- the expected return date;
- when the employee will respond to the inquiry; and
- where the writer can call or email for immediate assistance.

Additionally, it is the employee's responsibility to ensure responsiveness to written correspondence received through the US mail or by fax when out of the office. Should this occur, please be sure that individual mail (of business nature) is responded to according to this standard.

PART II

Requirements for Agency Initiated Correspondence

General Requirements: Agency initiated (sponsored) correspondence is defined as any document or literature transmitted to constituents, businesses, or other entities for information or follow up purposes from an agency, division, unit or employee. Examples include, but are not limited to, publications, informative literature (e.g. brochures and pamphlets), transaction-based correspondence, letters, email, faxes and memoranda.

The following instructions specifically apply to all agency initiated (sponsored) correspondence to constituents, businesses, agencies or other entities. These documents at a minimum must:

- include a contact telephone number for constituent questions. Staff members who answer this telephone number should have an understanding of what the literature entails and how to further assist with inquiries.
- include the date of publication to regulate version control and timeliness of information.
- be edited to ensure that the message conveys appropriate information and is free from grammatical and spelling errors.

If agency initiated correspondence contains additional contact information, all information provided should be standard (i.e. main agency email, fax, and street address), in order that employee turnover will not make contact information obsolete.

Facsimiles are considered correspondence and employees should follow standards for handling faxed documents as outlined herein. Additionally, these documents should:

- be standard and professional. Faxes should not contain personal logos or phrases that are different from the mission or goals of the agency or government.
- include the originators contact information should the fax arrive at the wrong office/entity or require additional follow up.
- be edited to ensure that the message conveys appropriate information and is free from grammatical and spelling errors.

Format of Letters and Memoranda: The purpose of formatting guidelines is to ensure uniformity in the presentation of District government letters and memoranda.

District Agency Home Page Requirements (Website): District-wide website requirements are to ensure that all agency web pages contain consistent and accurate information that is easily understood and useful for constituents. All website forms should have a designated agency email address (for receipt of submissions) and should follow responsiveness standards. Website standards and guidelines have been established by the Office of the Chief Technology Officer

and should be adhered to accordingly. The OCME website management should be coordinated through the agency's Chief of Staff.

EXEMPTIONS: The following exemptions apply to this policy:

- Mayoral issuances (i.e. Mayor's Orders, Mayor's Memoranda, and Mayor's Administrative Instructions)
- Correspondence where laws govern responsiveness (e.g. claims and lawsuits)
- Matters in litigation or where legal rule may apply and govern responsiveness
- Documents or transaction-based correspondence where timeframes for response are established and clearly articulated (e.g. DMV car registration renewal application)
- Documents, transaction-based correspondence, or applications where pre-established regulation processes govern guidelines and responsiveness (e.g. FICA and housing applications)

VI. Customer Service Standards for Face-to-Face Service

A. Overview and Scope

The OCME adheres to the DC government's face-to-face customer service standards for all aspects of an employee's interaction with customers seeking information or services in person, including the environment in which the interaction occurs.

B. Employee Knowledge

- All employees are expected to have basic knowledge about the government.
- All employees are expected to have a basic understanding of the primary functions of their agency.
- All employees should be able to adequately and appropriately refer customers to information sources (i.e., the DC.Gov website and the Citywide Call Center: 311).

C. Servicing Environment

The servicing environment is any place customers can walk in to seek services from the government. Within the OCME, these entry points include the receptionist area where members of the general public must report. It is the responsibility of the Customer Service Representative to ensure that the following policies are adhered to.

Display Requirements

- Adequate and appropriate signs must be displayed regarding OCME's visitor policies.

The following message for OCME visitor should be posted:

"Please be advised that visitors to the Office of the Chief Medical Examiner are limited to individuals conducting official business. Identifications (by photo only) are provided to no more than 3 family members or friends of decedents at one time. Also, due to the nature of business conducted at OCME, persons under 18 years of age are not allowed on the premises and under no circumstances will visitors be allowed access to decedents, biohazards or confidential information."

- Descriptions of services provided by the agency should be posted and/or otherwise readily available to customers.

The OCME pamphlets describing agency services shall be maintained, revised and updated by the agency's Customer Service Representative and posted at all times.

- Documents and forms necessary to conduct the primary business of the agency should be readily available to customers.
- Hours of operation should be published, posted and apparent to customers.
- Alternate service access options should be published, posted and apparent to customers (e.g. web address for electronic transactions)

Basic Accommodations

- Environment should be clean and free of litter.
- Room temperature should be adequate for reception of customers.
- Adequate seating and restroom facilities are required.

D. Service Efficiency

- Anticipated wait time should be communicated to customers (i.e., customers should be provided with an illustration of forecasted/projected wait time, allowing for appropriate adjustments for peaks and current conditions).
- Predetermined peak times should be proactively communicated to set customer expectations regarding potential wait times.
- Adequate resources should be available to assist customers within posted/published or otherwise communicated wait time.
- Supervisors or their designees should be available to assist with escalated issues during normal business hours upon customer request or as deemed necessary by employees.

E. Access to Services

- The agency should be able to readily accommodate, assist or facilitate assistance for people who are non-English speakers.
- The agency should be able to readily accommodate, assist or facilitate assistance for people who are physically challenged or in any way have difficulty ambulating or navigating the service environment without assistance.

F. Customer Interaction

Customers should be handled with the highest level of customer service by all District employees. Employees are expected to adhere to all aspects the following standards:

Standard Salutation (Greeting)

- State name
- State agency name
- Ask customer how you can be of assistance

Courtesy

- No chewing gum or eating while interacting with customers
- No secondary conversations or interactions contrary to the agency function should be conducted within the servicing environment while customers are present
- Be prepared and available to assist customers, when/if sedentary in the servicing area
- Use a customer-friendly tone
- Do not become confrontational

Etiquette

- Acknowledge all customers by at least making eye contact within the first 3 seconds of actual interaction
- Use customer-friendly gestures and facial expressions to welcome and receive customers
- Maintain eye contact
- Listen carefully to customer and take notes if necessary
- Probe to clarify customer's request
- Ask appropriate followup questions to verify understanding
- Speak to customers as you would like to be spoken to
- Keep customers informed of the progress on their issue to proactively manage their expectations.
- Assume personal responsibility for each interaction by either servicing the customer or by directing them to where their concerns will be appropriately addressed

Standard Close

- After the initial request has been fulfilled, ask the customer if he/she requires further assistance or has additional questions.
- Thank the customer for visiting your agency/department/office

VII. Guidelines for Interactions with Customers with Limited English Proficiency

The core business of the District of Columbia Government is to provide indiscriminate service to the public. Accordingly, the OCME is accountable for recognizing, appreciating, valuing and respecting the uniqueness of all individuals in performing our duties as employees and representatives of the government.

The agency is committed to recognizing and celebrating individual differences so that both customers and employees feel valued, not just tolerated. More specifically, on a daily basis, the agency will commit to providing exceptional service to everyone, regardless of their language, culture, nationality, or ethnic background.

The following guidelines should be adhered for customer service opportunities and encounters with people with limited English proficiency:

A. Telephone/Face-to-Face

- Use the proper greeting and/or acknowledgement based on the District's established customer service standards every time a person seeking service enters the servicing environment and/or reaches a government office by telephone.
- If a customer speaks in a language other than the language(s) that you are thoroughly familiar with, you must immediately refer to translation and/or interpretation information/resources for assistance to identify the language and to facilitate the service experience (ex. Language Line, other translation services, bilingual employees of the agency or other agencies, etc.).
- Never make guesses or assumptions about the language that is spoken.
- Never ask a customer if they speak or understand English.
- Never tell a customer that you only speak or understand English, unless you are specifically asked.
- Never indicate, verbally or in writing, that a customer must speak English in order to get service.
- Never raise your voice.
- Always be patient.
- Never become physically confrontational (ex. grabbing, shaking or touching in any way).
- **If a customer indicates that he/she can understand and speak English, you must:**
 - Speak in brief, simple sentences rather than long, compound or complex sentences.
 - Speak slowly and articulate distinctly; do not raise your voice.
 - Do not use agency jargon or abbreviations.
 - Do not ask "either/or" questions; pose two questions instead.
 - If the person is obviously having difficulty understanding you, try using different words or phrases.
 - Allow time for the person to translate and mentally process what you have said.
 - When necessary, offer the use of translation and/or interpretation services.
 - Recognize that customers of some cultures are not demonstrative. For example, a smile may hide truer emotions, such as frustration and/or confusion.
 - Recognize that silence should not be mistaken for misunderstanding or rudeness. In fact, a customer may in fact be silent for a number of reasons including, respect for your authority in the situation, agreement with what you are saying or doing, or fear of being judged on their ability to speak English.
 - Watch for non-verbal cues, such as nodding indicating that the customer understands what you are saying or doing. Recognize that everyone may not use verbal reinforcements such as "I see" or "uh huh".
- Show mutual respect for every customer who seeks assistance or services from you.
- Follow all of the District's established customer service standards, including those for telephone and face-to-face interactions.
- Be prepared to assist every customer who seeks services from your agency by knowing the resources that are available to you and knowing how to appropriately and efficiently use those resources.

B. Correspondence

- If you receive correspondence written in a language other than the language(s) that you are thoroughly familiar with, immediately refer to translation information/resources for assistance to identify the language and to facilitate drafting a response to the customer (For example, use Language Line, other translation services, bilingual employees of the agency or other agencies, etc.).
- Acknowledge and/or respond to all correspondence within 48 hours or 2 business days using the standardized acknowledgement letters that are presently translated into Amharic, traditional Chinese, French, Korean, Spanish, and Vietnamese. Should you

receive correspondence in a language other than the ones listed, immediately refer to translation information/resources for assistance to identify the language and to facilitate drafting a response to the customer (For example, use Language Line, other translation services, bilingual employees of the agency or other agencies etc.).

- Never respond in English to correspondence that is written in other languages.
- Never send requested materials, pamphlets, brochures, etc., written in English, to customers who have requested such materials in other languages.
- Never respond to correspondence that is written in other languages indicating that requests must be re-written in English in order for services to be provided.
- Always follow all of the District's established correspondence customer service standards.
- Be prepared to ensure the timely response to correspondence written in other languages by knowing what resources are available to you and how to appropriately and efficiently use those resources.

Don't

- Ask a customer if he/she speaks or understands English
- Make guesses or assumptions about a customer's native language
- Tell a customer that you only speak or understand English, unless you are specifically asked
- Indicate, verbally or in writing, that a customer must speak English to receive services
- Raise your voice or display other unprofessional behaviors when assisting a customer
- Make customers with limited or no English proficiency wait for service
- Send English versions of documents or responses to requests from customers that are written in other languages

Do

- Greet all customers appropriately and be prepared to assist those who have limited English proficiency
- Use language translation resources to accurately identify the language being spoken
- Facilitate service interactions in English only when customers indicate that they are proficient
- Use appropriate language translation resources to facilitate service interactions when necessary
- Remain calm, patient and professional at all times
- Provide assistance to customers in the order in which they arrive
- Ensure that commonly requested documents are available in the languages spoken by your customers and use translation or interpretation resources to draft appropriate responses when necessary